Growing wealth advisor looking for associate with portfolio operations and client service passion.

Our boutique wealth planning firm is growing and seeking a full-time Portfolio Operations Associate with great communication skills, excellent attention to detail, a passion for helping others and genuine interest in financial services. This position will be responsible primarily for managing client investment portfolios and for maintaining the investment software and databases. This position is ideal for an associate with less than five years' experience, looking to start a career with a with an established & growing wealth management firm.

Position Responsibilities

- Understand the firm investment philosophy and assist the portfolio manager with portfolio maintenance and trading activities (requires a series 65 within first 12 months).
- Supporting the investment team by learning and eventually mastering the firm's portfolio management system.
- Assist advisors during client meetings with both preparation and follow-up.
- Coordinate account transfers, deposits and distribution requests
- Onboarding new clients by following the established firm procedures and focusing on an outstanding level of attention, care and communications with new clients.
- Assist with any and all other administrative or firm related duties aligned to deliver extra-mile service experience to clients.
- Professionally communicate with affluent clients (in writing, verbally, and in person) to deliver superior client service.
- Supporting advisors of the firm by implementing advice through means of paperwork, communication, and record keeping.

Required Knowledge, Skills and Abilities:

- Excellent attitude and passion for extraordinary client service.
- Strong focus on getting details right the first time. Quality over Quantity.
- Follow company policies, especially those regarding ethics and compliance.
- Outstanding organization skills and the ability to balance multiple tasks simultaneously
- Self-motivated and ability to work independently without direct supervision
- Excellent interpersonal skills with the ability and desire to work in a small company office.
- Proficiency with MS Excel, Word and Outlook. Also, demonstrate the ability to efficiently use Google or other internet means for research and questions.
- Knowledge of portfolio accounting and trading systems a plus.
- Bachelor's degree in a related business field (Accounting, Economics, Business, etc.)
- Prior client service experience preferred.
- Series 65 IAR license a plus. (Requirement to obtain within first 12 months)

Compensation & Benefits

- Competitive starting pay with bonus opportunity – no sales, no cold calling, no conflicts.
- 401k & Profit Sharing retirement plan (combined 5-10% company contribution after 12 months)
- Insurance benefits paid by employer: 95% for health, 100% for disability and life.
- Opportunity for advancement based on performance, personal growth, and cultural fit.
- Work with a team oriented culture that is interested in helping you learn and grow in your career
- Other lifestyle benefits (Wellness, PTO, paid holidays, team lunches, etc.) provided.

CONTACT:

Please send a resume and cover letter explaining why this position is a good fit for you and why you are interested in becoming a member of our team. All inquiries should be sent to Jon Andre @ jon@twpteam.com .